



**TrackOne - Technical Guidance Bulletin**  
**TTGB – 2006-16**

**TO:** Regional Operators  
Indianapolis Private Industry Council  
Regional Coordinators

**FROM:** Amy L. Smith-Rubeck, MA, LMHC  
Director of Strategic Initiatives

**DATE:** February 8, 2007

**SUBJECT:** Update to Protocol for Transferring Clients between Regions

***Purpose***

To update the protocol to follow when transferring a participant from one region to another

***Rescission***

TrackOne Technical Guidance Bulletin, 2006-10  
Transferring a Participant from One Region to Another Region in TrackOne

***Content***

A client can be transferred from one region to another region if both Regional Operators agree. In these cases, the two Regional Operators should document their agreement and instruct a regional master user to make the change. The regional master user should document the change in the client's case notes. The case note should include the date of the agreement and the text of the Regional Operators' agreement when possible. The preferred documentation for the case note would be to cut and paste the e-mail or other correspondence regarding the agreement between the regional operators into the body of the case note.

Once this process is completed, the participant will only appear in the receiving region's performance and will be eliminated from the previous region's performance. The transferring Regional Operator should retain paper records for the client being transferred. The receiving Regional Operator will maintain paper records for the client also.

***Special Note***

The participant will not be a new enrollment for the receiving region. The receiving region will assume case managing the participant and the participation date will not change.

### Contact Person

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<b>TrackOne Technical Guidance Bulletin TTGB Number</b>	<b>Subject Matter</b>
2006-16	Update to Protocol for Transferring Clients between Regions
2006-15	Case Notes and Service Notes in TrackOne
2006-14	Change to TTGB 2006-13, Entitled “Dual Data System Usage”
2006-13	Dual Data System Usage
2006-12	Youth Provider or Eligible Training Program Number
2006-11	Obligation Tracking in TrackOne
2006-10	Transferring a Participant from One Region to Another Region in TrackOne
2006-09	Use of Z Codes following Conversion to TrackOne
2006-08	WIA Tier Progression Documentation Requirements for TrackOne
2006-07	New Enrollments into TrackOne
2006-06	Clarifications and Additions to TTGB 2006-04 Entitled “Case Management System Usage”
2006-05	Data Correction Protocol
2006-04	Case Management System Usage
2006-03	Allowing Log on Capabilities for Case Managers Providing Services at Multiple Locations within One Region
2006-02	To Establish the Procedure for Removing Former Employees’ Password Rights to the TrackOne Case Management System
2006-01	Youth Testing Requirements (Out-of-School)